Effective Program Planning and Proposal Development

Introduction

Designing programs and then writing effective project proposals to get them funded – especially for technology improvement projects – is always challenging. One of the most challenging aspects is how to develop a sound, complete project plan and then present it in the format required by the funding source. When you respond to a public-sector Request for Proposals (RFP) or Guidelines for Applications, you typically are required to use a set format for the project narrative. You also need to meet specific guidelines for the summary, budget, and attachments. This often includes page limitations. When you write a proposal to a foundation or corporation, you often have much more flexibility. Many private-sector funders do not have a required format, or provide a very flexible one.

Program planning typically occurs in one of two ways:

1. You identify a need and develop a project concept or plan to meet that need, then look for a funding source for it.
2. You see a funding opportunity, realize that you have a project need consistent with that opportunity, and develop the project and the proposal simultaneously.

In either case, you need a strong proposal. If you develop the project as you develop the proposal, you need to be especially careful that you are developing a project that is needed, feasible, and fully thought out. You should design it primarily to meet community and organizational needs, then "sell it" to the funding agency. The key is to avoid getting so caught up with meeting proposal requirements that your project ends up designed more for the funding source than for your organization and community.

This document assumes that you have already developed your project – through discussions and development of a concept paper or outline, use of a logic model format and process (see the companion document on using logic models), or perhaps use of a format that enables you to fully describe the project. You could use a proposal format that you find comfortable (such as the one described below). Then you can review the requirements of a particular funding source – such as a Request for Proposals from a public agency – to determine whether your project fits the requirements, then present the proposal in the required format.

This summary links a "typical" proposal format that includes all the components of a sound proposal with the Legal Services Corporation (LSC) requirements and format for Technology Improvement Grant (TIG) proposals. It also provides advice on how to ensure that your proposal to any funding source presents your project accurately and effectively while meeting funding source proposal requirements.

Typical Project Proposal Format

Following are the typical components of a project proposal, presented in a logical format. To prepare them, you need a very clear idea of the problem your project will address and your project plan – what you hope to accomplish in the short- and longer-term, beneficiaries, strategies and methods, your tasks and activities, and how you will manage, document, and evaluate the project. If you use this format to prepare a proposal, you will quickly identify missing project elements or planning decisions that still need to be made.

The order below is typical of foundation and corporate proposals. A public-sector proposal usually wants similar information, but the order can be quite different. Most often, the agency capability information goes at the end instead of the beginning, and often the budget is separately presented rather than made a part of the narrative.

The format below has two major benefits:
1. It is logical and relatively easy to use in preparing a proposal.
2. It can be used to guide project development, since it asks for all the information needed to fully develop a project.

Many nonprofits find it is helpful to first prepare a project proposal in this or another logical format and then to re-order and where necessary add information to fit a funding source's required format. This is particularly cost-efficient if you expect to seek partial funding from several sources, public and private. The format meets most or all the content requirements of most foundations and corporations and is very close to the preferred format of many of them. In addition, many have no required format.

Here is the format, along with some discussion of the content and importance of each section:

Project Summary
Written last but put first. Up to one page that summarizes the entire proposal including your capability and the amount requested as well as what you hope to accomplish and major strategies.

I.   Agency Capability
Summarize the history, structure, governing body, experience, and capability of your organization. Put this first in foundation or corporate proposals, because most funders don't know a lot about your organization, and they will take your whole proposal more seriously if you convince them early on that you are well qualified to carry out the program you are proposing. Be sure to focus on related experience, and to mention any proofs of "credibility" – measurable results of your work, recognition you have received, number of members, etc. If you are proposing a project that is new to your organization (for example, if you are seeking technology funding for the first time), include information about key personnel with appropriate skills.

II. Need for the Project

You need to convince the funder that the effort you are proposing is badly needed, and is something to which it should commit its resources – in effect, that your work is more important than other projects it might fund instead. This requires describing the general problem, providing statistics to document your statements (Both public- and private-sector funders are impressed by facts as demonstrated by statistics or case studies showing the special needs of your target community or population), then narrowing down the problem to show that a particular aspect is especially important, is not currently being addressed except by you, and can be solved if appropriately addressed. Use appropriate statistics and examples. Avoid emotional words, but present factual information and examples that will show the seriousness of the situation and the critical need for addressing it.

Since you can argue the need for all sorts of approaches to addressing these needs, it is important that you demonstrate why your approach is particularly important, and can have significant positive impact. Your needs statement talks about needs, not about how your program will operate. But it should describe the need and the potential for positive impact so clearly that if you asked someone to read it without any other section of a proposal, the person could tell you what kind of effort was being proposed.

III. Project Goals and Objectives

Often the weakest section of the proposal, and one of the most important. Tells the potential funder what you will accomplish both in the long run and during the funding period, if funding is provided. Include one or more long-term goals, as well as several measurable outcome objectives. Also provide – in this section or the Needs Statement – a paragraph describing the significance of the project: why it has special importance and potential impact.

This section should include the following:

- If the narrative is long, a **brief overview** of the project methodology – just one or two paragraphs that summarize the project's purpose and methods, which are described in detail in the rest of this section.

- **The long-term goal(s) of your project.** A **goal** is a statement of desired long-term program impact, and need not be immediately measurable, though it should be measurable in the long term (e.g., to increase access to justice for low and moderate income people through increasing their access to legal information and services, to increase the responsiveness of legal services providers in three states to low-income and low-literacy populations, or to ensure that low-income limited-English-proficient people have equal access to legal services). A single project usually will not enable you to meet the goal, but should help you make measurable progress toward it.

- **Outcome objectives**, which state a program result in measurable terms with a time deadline (for example, to establish a computerized system that enables low-income people in five states to effectively represent themselves, acting as *pro se* litigants, or

to implement an affordable program model for sharing information technology staff and resources among legal services organizations throughout the state). The funding source often expects you to meet these outcome objectives during the project funding period – or to be able to show that they have been met through follow-up evaluation after the project ends. These objectives should be important but also realistic – funders will judge you by whether you meet them.

- **Process or "task" objectives or "outputs,"** which describe tasks which will be carried out during the project, in measurable terms, with a time deadline (e.g., to develop a specified number of user-friendly multimedia – video, text, and audio – presentations that demonstrate the roles and the courtroom protocols for *pro se* litigants, or to develop a tool to analyze the benefits and potential disadvantages of shared information technology resources). Meeting these process objectives does not ensure you will also meet the outcome objectives – but should indicate that you are making progress towards them.

- Either in this section or at the end of the Needs or Problem Statement, an explanation of the **significance** or **anticipated benefits** of the project. This might include replicability – the fact that your project will test a program model or design that can be used in other legal service organizations or expanded to the entire country. It might be the broader impact of your project on clients or community. For example, if limited-English-proficient people understand their legal rights and have access to legal services, efforts to deny those rights (for example, by employers) may be reduced. This is a very important part of your proposal, since it shows the funder that the money you receive will have impact beyond the specific legal services programs involved in the project and the clients they serve.

IV.   **Methods or Work Plan**
        The prior section indicated what you plan to accomplish. This section explains *how*. It should include the following kinds of information:

A.   **Target population** – the number and characteristics of the people your effort will serve or benefit. If you are developing a *pro se* project, who will benefit? If you are providing training, who will participate? If you offer services, who will receive them? Legal services organizations typically serve low-income people in need of legal assistance, but you may be targeting specific subpopulations, such as isolated rural residents, low-income inner-city dwellers, people with limited English proficiency, individuals with low literacy, people with disabilities, particular racial or ethnic groups, etc. Be clear about the number and characteristics of people you will serve directly, or the characteristics of the population or community that will benefit indirectly from your work.

B.   **Program components** – a description of the major types of activities you will carry out, focusing on what you will do (*substance,* not *process*). For example, you might be involved in developing a website, adding legal service capacity, developing software systems to create court forms or preparing actual forms, providing training

for attorneys or other groups, etc. For each component, provide an understanding of your philosophy or approach, the content of the training or forms or legal services, or other information that demonstrates the soundness of your concepts and your knowledge of the program area. This section needs to convince the funder that the systems you develop or the services you provide will be sound and valuable – and worth the funds required to implement them.

C.   **Tasks** – a description of the tasks including steps or activities you will carry out in order to reach your objectives, focusing on *process*. For example, if you are going to develop a website, lay out the tasks and steps required, from use of a specified design to actual development and implementation of the website. If you are doing training, describe the steps, such as development of training curriculum and materials, recruitment of participants, training delivery, evaluation, and follow up. Sometimes much of this can be done in chart form, providing an implementation plan with timelines that lists activities, milestones, and products, and indicating when tasks will begin and end. This section demonstrates that you not only know what you want to create, but also understand how to fully implement the project. Since many new or demonstration projects are never fully implemented, funders are concerned that you know what you need to do to fully implement your project – the steps, their interrelationships, and the time required.

D.   **Collaboration or partnerships** *(optional)* **–** where appropriate, addresses collaboration with other organizations including partnerships in which funding will be shared. This section often references letters of commitment from partners, provided in the appendix. For TIG grants, demonstrating involvement and support of various segments of the state justice community is a requirement.

V.   **Monitoring and Evaluation**
(Sometimes a separate section, sometimes a subsection of the Work Plan)
A plan for documenting, monitoring, and evaluating your project. This is now required by nearly all funders, who want to know whether you completed planned tasks, met "process" objectives, and made progress towards longer-term outcome objectives and goals. Your plan should also enable you to monitor new projects in their early months and be able to make changes as needed to improve program performance. Evaluation is especially important for a demonstration project, since you can't generate a replicable model unless you document and assess the demonstration. Your proposal needs a clear design for evaluation, including evaluation questions to be answered, measures of success, data to be collected (including how and from what sources), and analysis plans.

VI.   **Management and Staffing**
Brief but specific information on how the program will be organized, including supervision, staff structure and responsibilities, and the experience and credentials of proposed key staff and consultants. Be sure that the tasks you described are all assigned to someone, and that your budget is consistent with the staffing plan.

V.   Budget and Financial Information
Indicate the total project budget, how much has already been obtained and from what sources, how much must still be raised, and what you are requesting over what period. Include a detailed budget that includes what a public-sector proposal calls the Budget Narrative. Many funders also want you to indicate how the project will be continued after their funding ends.

Format for the Project Narrative of a TIG Proposal

Like most public-sector proposals, the TIG application format calls for an Executive Summary (limited to 250 words), a Budget (using a standard format) and a Budget Narrative – all separate from the Project Narrative.

Instructions for the Project Narrative suggest that you should be sure the narrative includes the following overall content:
- The goals of your project
- The means/strategies/methods through which you expect to achieve your goals
- The partners you plan to involve
- The people affected by the project outcomes

Format for the Project Narrative: LSC specifies a format that calls for a brief project description plus one section for each of the six review criteria. This format does not enable you to easily present the typical components of a work plan (or the four "content areas" listed above) in their usual order. But the desired format is clearly defined in the Guidelines for Applications, and it can be linked to a more common proposal outline. The TIG format calls for the following:

1. **Project Description:** Brief identification of what your project is and what you hope to accomplish with it. (This section is supposed to be a brief overview of your project plan.)

2. **Impact for Clients:** Description of how the project will improve access to legal services or legal information for the LSC client community, including:
   - Definition of the problem or deficiency within the current delivery system.
   - Proposed creative and practical methods to be used to address the problem or deficiency with the use of technology.
   - Identification of anticipated outcomes and potential impacts for the client community that are realistic and measurable.

3. **State Justice Communities:** Description of how the proposed project makes use of and includes broad participation from stakeholders throughout the state justice community, including (but not limited to) court systems, bar associations, client groups, community organizations, public and nonprofit social service agencies, and non-LSC funded legal service providers. Also includes:
   - How the project is supported by and fits the statewide technology plan.
   - Evidence of coordination with other programs in your state that are implementing TIG projects.

4. **Replication Potential:** Evidence that the project will serve as a model and has the potential to be replicated broadly throughout the country. Includes either LSC ownership of the product or software, or minimal or no-cost licensing by other LSC programs. Also includes attention to the following six factors:
   - Degree to which the identified problem is commonly found in the legal services recipients' environment.
   - Relative advantage of the project's innovations over established approaches for addressing the identified problems.
   - Ease of replication and adaptation by other jurisdictions.
   - Extent to which the project uses standard tools and software.
   - Extent to which the project improves the capacity of the system to deliver legal services as cost effectively as possible in areas outside that of the applicant.
   - Plans for active dissemination of the knowledge gained from the project.

5. **Improving Client Access to Technology:** Description of how the project will address specific identified barriers that limit a community or group's access to legal assistance, legal information, and the courts. Includes description of the input provided by the targeted end users client community and groups serving clients in identifying barriers and developing strategies to address them, as well as plans for end user training and skills upgrades, and building of community awareness, knowledge, and support of the project. Includes demonstration of how the project will address client barriers related to each of the following:
   - Geographic isolation in rural areas.
   - Inadequate resources and lack of computer and Internet access in urban areas.
   - Limited literacy or limited English proficiency.
   - Limited ability to use technological tools due to limits on skills, knowledge, confidence, or support.
   - Lack of interfaces to facilitate access for persons with disabilities.

6. **Evaluation and Documentation:** Description of how the project will document and evaluate project effectiveness and efficiency, which includes both project activities and anticipated outcomes. Includes a description of the evaluation design (including methodology and data collection and analysis plans), implementation plan, and allocation of resources for evaluation, as well as qualifications of proposed evaluators. Also includes plans for effective recordkeeping strategies that facilitate both internal and external evaluation.

7. **Feasibility:** Description of project feasibility, including:
   - Technical approach: how the proposed system will be developed and how it will work, how it will operate with other systems, technological alternatives considered, designs for system maintenance and upgrades, and system adaptability to unforeseen developments; includes evidence of use of existing infrastructure and commercially available telecommunications services or documentation of extraordinary circumstances that require construction of new network facilities.

- Applicant's organizational capacities and qualifications of the project staff and any external personnel: demonstration of experience in managing and staffing similar projects, understanding of needed organizational support, and partner commitments to carry out specific roles and responsibilities.
- Proposed budget and implementation schedule: budget clarity and appropriateness to the tasks proposed, with clear relationship to the project narrative; project cost-effectiveness; and evidence that the implementation process is comprehensive and reasonable.
- Plan for sustaining the project beyond the grant period: potential long-term viability, given the economic circumstances of the community(ies) and applicant strategies for sustaining the project.

Linking the TIG Project Narrative Format and the Typical Project Proposal Format

The columns on the following page link the sections of a typical project proposal (left column) with the sections and subsections of the TIG project proposal. As the comparison shows, the TIG format is challenging because sometimes information that is in a single section of the typical format is split across two or more sections of the TIG format. This occurs because of the special priorities and proposal review criteria used for the TIG applications – and because each section of the Project Narrative except for the brief overview (which means sections 2-7 above) corresponds to one of the review criteria used by the agency in evaluating applications.

Some Typical Weaknesses in TIG Project Proposals

Discussions with LSC staff and a review of sample project proposals identify a number of weaknesses in TIG project proposals. Following are some of these weaknesses, with emphasis on weaknesses in proposals that *were* funded as well as in proposals that were *not* funded. Of course, one major reason projects were not funded is that the number of applications was far greater than the available funding – and the greater the competition, the more important it is that a proposal clearly address review criteria and be effective in content and presentation.

Proposals that were *not* funded often had important weaknesses directly related to the review criteria, such as:

- **Insufficient information on how the project would improve services to legal services clients** – resulting in a low score on Review Criterion #1, Impact for Clients
- **Lack of or limited coordination with other state justice system stakeholders** – resulting in a low score on Review Criterion #2 - State Justice Communities
- **Plan or model that duplicates existing initiatives or is not innovative** – resulting in a low score on Review Criterion #3 - Replication Potential

Comparing the "Typical" Proposal Format to the TIG Format

"Typical" Format	TIG Format Sections (and Subsections)
Project Summary	**Executive Summary**
Agency Capability	**Feasibility** (Applicant's organizational capacities and personnel qualifications)
Need for the Project	**Impact for Clients** (Definition of the problem or deficiency) **Improving Client Access to Technology** (Identification of barriers for community or clients targeted)
Goals and Objectives (Includes Significance and, for demonstration projects, replication objectives)	**Impact for Clients** (Anticipated outcomes and potential impacts for the client community) **Improving Client Access to Technology** (Identification of how the project will overcome specific barriers) **Replication Potential**
Methods or Work Plan	
• **(Overview)**	**Project Description** (Identification of project and what you hope to accomplish – supposed to be a brief overview)
• **Target Group**	**Improving Client Access to Technology** (Identification of specific community or group that has access barriers you will address)
• **Components** (Philosophy and methods or strategies)	**Feasibility** (Technical approach) **Impact for Clients** (Proposed methods to address the identified problem or deficiency)
• **Collaboration or Partnerships**	**State Justice Communities**
• **Tasks or Activities**	**[Milestone Narratives]**
• **Evaluation Plan**	**Evaluation and Documentation**
• **Management and Staffing**	**Feasibility** (Implementation schedule)
Budget and Financial Information	**[Budget and Budget Narrative]** **Feasibility** (Proposed budget and plan for sustaining the project)

- **No clear, developed evaluation plan** – resulting in a low score on Review Criterion #5 – Evaluation and Documentation
- **Unrealistic or overly ambitious project goals and plans** – resulting in a low score on Review Criteria #1 - Impact for Clients, and #6 – Feasibility

Projects that *were* funded often have some of the same weaknesses – but not to the same degree. Among the most common weaknesses of funded projects are the following:

- **Failure to follow the specified Project Narrative format –** most often, putting most of the project narrative in what is supposed to be the brief Project Description, and very little information into some of the other sections. This means the proposal reviewers have to look for the missing information from each section in the Project Description, which makes the proposal hard to score. Often, the proposal responses to the main concept or title of the section (e.g., Feasibility), but does not address all the bullet points specifying desired content for that section.
- **A project plan that has information missing –** for example, some objectives have no tasks defined to meet them, or some tasks do not seem to be assigned to any staff member, or the budget does not include needed costs.
- **Overambitious goals and objectives** – outcomes that are not likely to be achieved in the time frame of the project and with the funds available.
- **Poorly specified goals and outcome measures –** lack of concrete, measurable evaluation criteria that can be used for assessing progress and results
- **Lack of a real evaluation plan –** a few paragraphs indicating that the project will be evaluated, but no substantive plan that shows an understanding of evaluation methods
- **Complex, hard-to-understand language and syntax** – highly technical writing and lack of clarity in presentation, so that reviewers and partners alike will find it difficult to understand

Avoiding Common Problems and Preparing Quality Proposals

To avoid these and other common problems in proposals, use this checklist both in outlining your proposal and in reviewing the draft before you submit the proposal.

☐ 1. **Understand and follow the format specified by the funding source.** *If the funding source provides a specified format, use it, even if you think your format is better.* This is particularly important when the proposal will be reviewed using specified criteria – the reviewer may not bother to look in other sections for information that is not where it "belongs" according to the required format. While public agencies are more likely than foundations and corporations to have a set format for proposals, a growing number of local foundations and some corporations adopt the standard format developed their local Regional Association of Grantmakers (RAG). This standard format saves you time if you want to submit a similar proposal to several foundations. One way to be sure you both follow the funding source's format and include all the information you consider important is to first write the proposal in your logical format and then link those sections with the funding source's specified format – as was done above with the "typical" proposal format and the TIG format.

☐ **2. Use a team approach to develop a practical project plan.** Often, applicants over-promise, or fail to allow enough time for particular project phases or tasks, because they write the proposal at the last minute. Sometimes the problem is that the individual writing the proposal has needed technical knowledge but lacks an in-depth knowledge of the overall service system. For example, a technology specialist may be able to describe the steps in developing a website or designing a database, but may not know about the practical challenges of working with understaffed legal services attorneys and other staff to get needed information and involvement. The best way to design a technologically sound project that is also feasible in the "real world" of legal services is to use a team approach in project design – involving all the necessary professions and partners. This does not mean everyone helps to write the proposal. It does mean that they agree on what can be accomplished and how, and that they review the goals, objectives, work plan, and timeline to determine whether they are really sound and achievable.

☐ **3. Learn to write sound goals, outcome objectives, and process objectives.** Review the definitions provided in the "typical" proposal format, and also consider the following.

Write outcome objectives that are SMART. Every objective should be:

/ **Specific:** Identify who, what, and where.

/ **Measurable:** Identify when and how many or provide some other standard for measurement.

/ **Appropriate:** Provide a useful and meaningful measure of success that is important enough to justify the funding and other effort required.

/ **Reasonable/realistic:** Are achievable within a specified time period using available technology and resources.

/ **Time-phased:** Have a time deadline for completion.

Use the following guidelines when writing objectives:

a. Begin with the word *to,* followed by an action verb.

b. Where the criteria for determining whether the desired result has been accomplished are not obvious, indicate the measures you will use in determining success. Ask yourself, "Can I measure or verify whether this objective has been met?" If not, you probably need a more specific statement of the result, and perhaps the addition of some criteria for measuring success. For example, here is an outcome objective that needs improvement:

Unclear
verification: *To ensure that all partners are aware of "best practices" in advocate and client site navigation, use, content, and development.*

Question: When can we say a partner agency is "aware" of "best practices"? Does this mean the agency received information? That someone or several individual read it and understood it? That someone participated in a meeting where practices were shared? What is the reason for wanting awareness – so partners can choose appropriate models for the project to use or for their individual agencies? What indicators can we use to determine whether this desired result has been achieved?

Criteria
added: *To ensure that the individual responsible for technology development at each of the five partner agencies identifies at least one "best practice" of interest to his/her agency in each of the following: advocate and client site navigation, use, content, and development within six months after project initiation.*

c. Avoid stating "why" or "how" the desired result will be achieved; stick to "what" and "when." The other information is methodology, not objectives. (For example, the "how" for the example above might be a combination of providing written materials or a guide, having on-line discussions, and then selecting the "best practices" in each area that they consider most promising for their use, or perhaps completing an on-line survey assessing the usefulness of the models presented and discussed. You might have process or task objectives that address these methods.

d. Be sure to state the objective in terms understandable to both proposal reviewers and project staff who will be implementing the proposed program. If you are unsure about the clarity of an objective, ask someone outside the subject area to read it. If that person cannot understand it, consider revision.

e. Review each objective to be sure it meets SMART criteria. This includes reviewing your objectives in the context of your resources. Be sure the objectives are in fact realistic, given the resources you are requesting and the problems you are likely to encounter.

f. Review the objectives in the context of your work plan. Do you have specific plans to carry out the activities required to meet each objective? If not, either the work plan or the objectives need revision.

☐   **4. Design the evaluation plan as part of project design, and include it in your proposal.** Carefully review the requested information and be sure you include it all. This usually means indicating the types of evaluation you will carry out and

summarizing the measures of success you will use, the kinds of data you will collect and from what sources, the data collection methods and instruments you will use, and your analysis plan. If no one on staff has enough evaluation experience, hire an evaluation consultant to write that section – or choose a consultant who is willing to write the section free with the agreement that if funded, you will hire him/her to do the evaluation. Often an area university professor will be interested in working with you, often at a reasonable cost, especially if students can help with the evaluation. Be sure to include the consultant's resume in your proposal. You may also be able to use a design similar to that of a similar project that is completed or in process. Contact funded legal services organizations and ask to see their evaluation design and to give you advice on what worked and what didn't.

☐ 5. **Use a "Logic Model" or some other logical format to help you design a project that is complete and consistent.** A Logic Model helps you consider the resources available, what you want to accomplish in the short- and long-term, and the tasks or activities and "outputs" (measures of services provided or tasks completed) needed to get there. This kind of format helps you avoid missing tasks or budget items and also helps you define appropriate outcome measures. (For more information, look for the *Introduction to Logic Models* in this package of materials.)

☐ 6. **Become familiar with the review process used by the funding source from which you are seeking funds.** If you are submitting a proposal to a public agency – federal, state, or local – remember that:

   a. **Often an external review panel will review your application – and the composition of the review panel may be extremely varied.** The knowledge and experience of panel members differ. If you submit a proposal to a source other than the Legal Services Corporation, the panel may know more about the content area (e.g., technology) than about legal services. You need to understand the probable level of knowledge and experience in both legal services and technology in order to write at the appropriate level for the reviewers.

   b. **Panels often have many proposals to review in a very short time.** This means, for example, that they may be reading your application at 2:00 a.m. You can improve your score by putting all information where the RFP asks you to put it, using the same terms as the RFP, and making your proposal as easy as possible to follow and understand.

   c. **Your application may be reviewed by all panel members – or by only 2-3 if the panel is large.** There may be primary and secondary reviewers assigned to read specific applications, and the rest of the panel may read only your Summary or Abstract—so be sure it is clear and effective!

   d. **Reviewers are expected to consider only the information included in the application, and to give points only based on the review criteria.** Even if a

panel member knows your work, s/he is not supposed to consider any information except what you submit in the application. So be sure to include all needed information about your organization, the communities you serve, and your project.

e. **The external review is just one step in the total selection and grant awards process.** If a proposal is "disapproved" by the panel, it typically is dropped from further funding consideration. However, an "approved" and highly rated proposal is not always funded. The agency will be looking for diversity in the applications funded. Be sure your proposal describes what is special about your approach and why it has a high probability of success.

If you are seeking funds from a foundation or corporation, understand the funder's priorities and ask a representative about the review process. Sometimes a single staff member does the basic review and recommends whether or not the proposal should be funded. Sometimes a staff team reviews proposals. Approval by a Board of Trustees may be required, and that approval may be largely *pro forma* or based on an in-depth discussion. If the Board has a major role, review a list of Board members and affiliations. If staff play the key role, meet with members of the funder's staff and be sure they know the importance and quality of your work.

The more you know about the funding agency's guidelines, priorities, and review process, the more effectively you can target your proposal.

☐ 7. **Write clearly – readers should not have to be technical specialists to understand your project plan.** Focus on two related needs: making sure your project description is presented logically and clearly, and ensuring that non-"techies" can understand your project's purpose, significance, and approach. Often, a review panel includes both technical specialists and generalists. Foundation and corporation staff are less likely than public agency reviewers to be technical specialists, unless the grantmaker has a narrow technical focus. Even a proposal for legal services technology has a purpose and proposed impact that should be comprehensible to attorneys and program administrators. Both reviewers and the users of proposals may be unfamiliar with complex technical terms, so define and explain them. If you need to present a website technology or proposed client management software, only the technical description of the software needs to use highly technical language – and the technical details often belong in a figure or appendix. Presenting complex concepts clearly and understandably greatly strengthens your proposal. This is another reason for a team approach to project design, and for assigning a proposal-writing team that includes one technology specialist and one legal services specialist – as well as a plain-language editor.